

SuccessFactors requirements for Screening Question bot

What the customer needs to do in their SuccessFactors instance

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Assumptions

- Create a Question Library

Configuration

Prepare Bot User

Identify user

We recommend create a specific users for RPA bots (or a user per device/VM). However, the customer can use any API or integration user they already have.

Give permission roles to user

Create a group and role for your rpa user (use the same for every bot)

[2278695 - The minimum permissions required to query OData API Candidate entity - Recruiting Management](#)

OData API Basic Authentication Configuration

Set to Always

Resetting User Passwords

SAP2024! SAP2022!

Password & Login Policy Settings

Set Set API login exceptions...

Create New User Security Setting

Use this page to create a new user security setting

Username: *	<input type="text" value="RPAUSER"/>
Maximum password age(days):*	<input type="text" value="-1"/> Set to -1 keep password not expiring (not recommended)
IP address restrictions:*	Apply the maximum password age only when user is accessing from the following IP address(es) (for example 10.20.30.41, 10.20.30.40-10.20.30.50): <input type="text" value="0.0.0.0-255.255.255.255"/>

Define and populate Objects

Define Objects

Configure Object Definitions

cust_REC_Questions

Mark as required:

```
{  
  "questionId": "1382",  
  "questionType": "QUESTION_MULTI_CHOICE",  
  "required": false,  
  "score": false,  
  "disqualifier": false  
}
```

Set default values to all you can.

Object Definition: cust_REC_Questions (cust_REC_Questions)

* Code	cust_REC_Questions ?
* Effective Dating	Basic ?
API Visibility	Editable ?
* Status	Active ?
MDF Version History	No Selection ?
Default Screen	?
Label	cust_REC_Questions ? ?
Description	?
API Sub Version	V1.1 ?
Subject User Field	?
Workflow Routing	?
Pending Data	No ?
Todo Category	Generic Object Change Requests ?
Object Category	No Selection

Fields

Name	Database Field Name	Maximum Length	Data Type
externalCode	externalCode	128	String
externalName	externalName	128	String
effectiveStartDate	effectiveStartDate	10	Date
cust_questionID	sfFields.sfField1	255	String
cust_questionGUID	sfFields.sfField2	255	String
cust_questionLibrary	sfFields.sfField3	255	String
cust_questionCategory	sfFields.sfField4	255	String
cust_questionType	sfFields.sfField5	255	String
cust_questionLabel	sfFields.sfField6	255	String
mdfSystemEffectiveEndDate	effectiveEndDate	10	Date
mdfSystemTransactionSequence	transactionSequence	255	Number
mdfSystemInternalCode	internalCode	255	Number
mdfSystemEntityId	entityId	255	String
mdfSystemRecordId	recordId	255	String
mdfSystemStatus	effectiveStatusStr	255	Enum
mdfSystemObjectType	objectType	255	String
mdfSystemId	id	255	Number
mdfSystemCreatedBy	createdBy	100	User
mdfSystemCreatedDate	createdDate	35	DateTime
mdfSystemLastModifiedBy	lastModifiedBy	100	User
mdfSystemLastModifiedDate	lastModifiedDate	35	DateTime
mdfSystemProxyUser	proxyUser	255	String
mdfSystemRecordStatus	recordStatusStr	255	Enum
mdfSystemOptimisticLockId	optimisticLockId	255	Number
mdfSystemOptimisticLockUUID	optimisticLockUUID	255	String
mdfSystemExternalUserVisibility	externalUserVisibility	1	Enum
mdfSystemVersionId	versionId	255	Number
cust_required	sfFields.sfField7	5	Boolean
cust_disqualifier	sfFields.sfField8	5	Boolean
cust_questionWeight	sfFields.sfField9	38	Decimal
cust_score	sfFields.sfField10	5	Boolean
cust_locale	sfFields.sfField11	128	String

Use a custom picklist for the question types.

cust_REC_QuestionGrouping

Object Definition: cust_REC_QuestionParent (cust_REC_QuestionParent)

* Code	cust_REC_QuestionParent ?
* Effective Dating	Basic ?
API Visibility	Editable ?
* Status	Active ?
MDF Version History	No Selection ?
Default Screen	?
Label	cust_REC_QuestionParent ? ?
Description	?
API Sub Version	V1.1 ?
Subject User Field	?
Workflow Routing	?
Pending Data	No ?
Todo Category	Generic Object Change Requests ?
Object Category	No Selection

Fields

Name	Database Field Name	Maximum Length	Data Type
externalCode	externalCode	128	String
externalName	externalName	128	String
cust_NumbQuestions	sfFields.sfField1	255	Number
cust_Country	sfFields.sfField2	255	String
mdfSystemEffectiveStartDate	effectiveStartDate	10	Date
mdfSystemEffectiveEndDate	effectiveEndDate	10	Date
mdfSystemTransactionSequence	transactionSequence	255	Number
mdfSystemInternalCode	internalCode	255	Number
mdfSystemEntityId	entityId	255	String
mdfSystemRecordId	recordId	255	String
mdfSystemStatus	effectiveStatusStr	255	Enum
mdfSystemObjectType	objectType	255	String
mdfSystemId	id	255	Number
mdfSystemCreatedBy	createdBy	100	User
mdfSystemCreatedDate	createdDate	35	DateTime
mdfSystemLastModifiedBy	lastModifiedBy	100	User
mdfSystemLastModifiedDate	lastModifiedDate	35	DateTime
mdfSystemProxyUser	proxyUser	255	String
mdfSystemRecordStatus	recordStatusStr	255	Enum
mdfSystemOptimisticLockId	optimisticLockId	255	Number
mdfSystemOptimisticLockUUID	optimisticLockUUID	255	String
mdfSystemExternalUserVisibility	externalUserVisibility	1	Enum
mdfSystemVersionId	versionId	255	Number

Associations

Name	Multiplicity	Destination Object	Type
cust_REC_Question	One To Many	cust_REC_Questions	Valid When

OData API Metadata Refresh And Export

Populate objects

Upload sample data

Using *Import and Export Data*

Download the template, fill in the data, and import the file.

Customize manually or using excel file (optional)

Using *Manage Data* or *Import and Export Data*.

Do Update RBP to allow bot/users see MDF data

Tie MDF objects to RBP permissions (out of scope)

Create/Modify Route Map

Using *Manage Route Maps*. You can create a new Route Map or duplicate an existing one. The requisites for this new Route Map are:

Add a step and assign it to RPA bot user

Step is assigned statically to the bot user

Ensure there's a step for human validation before publishing

In our demo, added a Recruiter step

Edit the Job Requisition template

Assign new Route Map to Job Requisition template

Using *Form Template Settings*.

Add custom field to Job Requisition template

Using *Manage Templates*.

The screenshot shows a 'Custom Field' configuration window. It contains the following fields and options:

- Field-ID ***: Text input with value 'cust_REC_QuestionPare' and a help icon.
- Field Type ***: Dropdown menu with 'object' selected and a help icon.
- Field Label ***: Text input with value 'cust_REC_QuestionPare' and a help icon. Below it is a blue 'Add More+' link with a help icon.
- Field Description:** Text input with value 'cust_REC_QuestionPare' and a help icon. Below it is a blue 'Add More+' link with a help icon.
- Required:** Radio buttons for 'True' and 'False', with 'False' selected and a help icon.
- Object Type ***: Text input with value 'cust_REC_QuestionPare' and a help icon.
- Source Field Name:** Empty text input with a help icon.
- Destination Field Value:** Empty text input with a help icon.

Permission fields as needed

Using *Manage Templates*.

Field permission

Field Permission Description:

Write access to Recruiter

Field Permission Type *

Write Permission

Field Permission Role Name *

All

Selected

Recruiter

Field Reference ID *

Multiple (42)

Field Permission Status *

All

Selected

pre-approved

Perform an OData refresh

TBD

Make field reportable (optional)

Number38	
Number39	
Number40	

Picklist, Object

Extended Table Column Name	XML Custom Field ID
Picklist1	cust_REC_QuestionGrouping
Picklist2	
Picklist3	
Picklist4	
Picklist5	
Picklist6	
Picklist7	

Make field reportable in the picklist section

Create a Business Rule

Business Rules can be use to automatically set the value of the field in the requisition based on other information of the requisition.